



USDA Weekly Retail Turkey Feature Activity

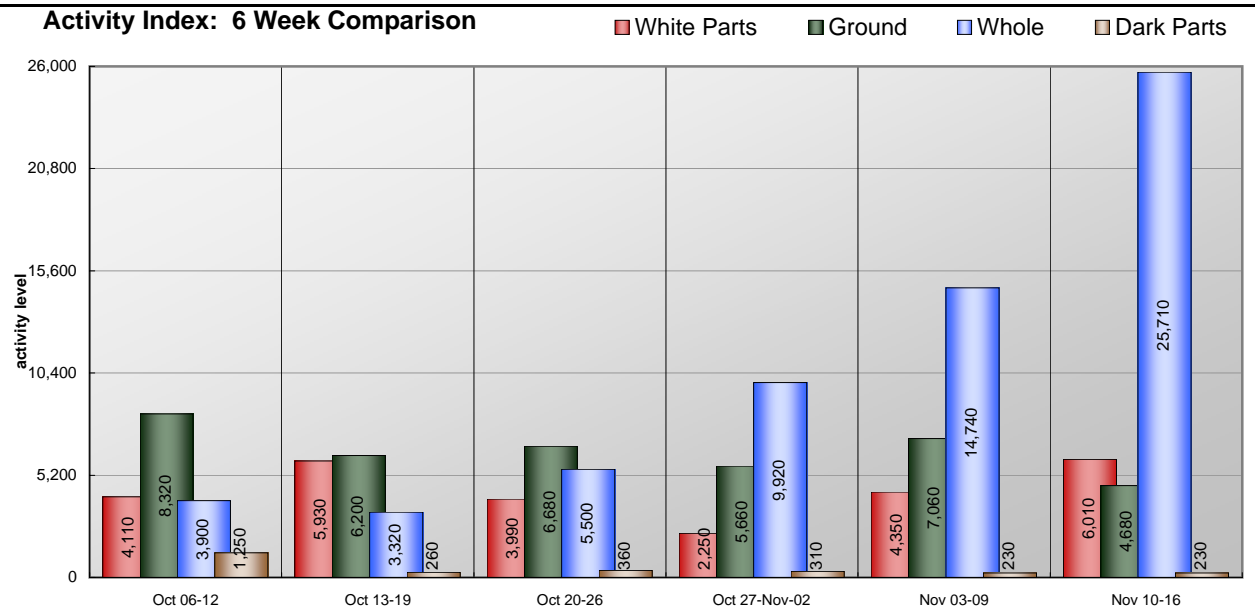
Fri. Nov 10, 2006

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/10 thru 11/16.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

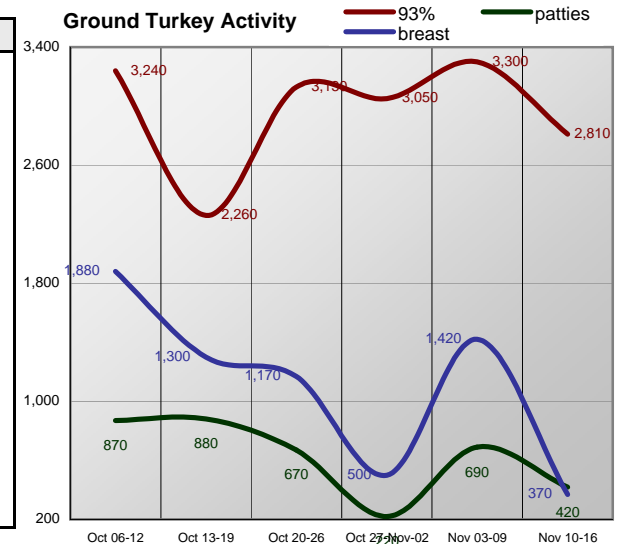
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate 1/	61.4% of 17,000 outlets		66.7% of 17,000 outlets		70.2% of 16,700 outlets	
Special Rate 4/	11.6%		15.8%		11.7%	
Activity Index 2/	37,170		27,320		38,820	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	2,300	1.13	670	0.88	840	1.27
" - Toms	2,300	1.13	670	0.88	640	1.20
Frozen - Hens	10,450	0.75	6,820	0.67	12,590	0.74
" - Toms	10,660	0.75	6,580	0.63	12,630	0.72
PARTS:						
Breast:						
Bone-in, whole						
Fresh	790	2.17			550	2.08
Frozen	1,670	1.78	1,550	1.33	1,930	1.37
Hotel Style						
Fresh						
Frozen	10	1.79	10	1.18		
Split, bone-in						
Fresh					70	3.99
Rotisserie	630	7.17	960	6.33	30	7.99
Boneless, whole						
	30	4.24	10	3.99	60	3.49
Cutlets						
	1,120	4.27	840	4.18	1,420	3.96
Cutlets, thin sliced						
	80	4.08	250	4.70		
Strips						
	730	4.54	360	4.44	430	4.21
Tenders						
	950	4.19	370	3.96	620	3.88
Marinated Tenders						
	80	3.92	840	3.85		
Drumsticks						
	200	0.99	60	1.15		
Thighs						
			20	1.29		
Wings						
			60	1.15		
Necks						
			40	1.09		
Smoked Drumsticks						
	30	1.39	20	1.94	210	1.59
Smoked Wings						
			20	1.94	150	1.64
Smoked Necks						
			10	1.38		
GROUND TURKEY:						
	4,680	2.46	7,060	2.59	6,650	2.66
Patties						
	420	2.45	690	2.74	360	2.50
Sausage						
	1,050	2.43	1,220	2.44	1,950	2.39
85% lean						
	30	0.99	430	1.74	1,160	1.71
93% lean						
	2,810	2.31	3,300	2.18	1,590	2.17
Breast						
	370	3.89	1,420	3.86	1,590	4.19
Rolls (frsh/frz 1 lb.)						
	460	1.05	100	1.00	--	--

Note: rolls not included in ground fresh ground turkey total and weighted average.



Turkey Featuring - 11/10 thru 11/16

Feature activity for turkey items continues to build with the Thanksgiving holiday now less than 2 weeks away. Whole birds offerings are up considerably over last week but slightly less than last year and at slightly higher average price levels. Fresh birds are beginning to show in ads late in the cycle marking the start of the switch from frozen to fresh whole bird promotions. Breast cut promotions are also up sharply from last week led by bone-in breasts and cutlets, both at sharply higher price levels than last week. Dark parts are fairly quiet this week. Ground turkey featuring is off from last week with 93% lean and sausage items continuing to dominate space. Price levels are likewise lower than last week. As was the case last year, \$0.29 is the lowest advertised price for whole frozen birds this week free of restrictions. With Thanksgiving on the horizon, over 35% of sampled stores are conducting special promotions and fully 62% of sampled outlets are promoting Thanksgiving meals featuring turkey.



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/: FEATURE RATE: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/: ACTIVITY INDEX:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). **3/: STORES/AVG:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/: SPECIAL RATE:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.)



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	EASTERN U.S. (CT,DC,DE,FL,GA,MA,MD,ME,NC,NH,NJ, NY,PA,RI,SC,VA,VT,WV)			CENTRAL U.S. (AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,MO,MS,ND, NE, OH, OK,SD,TN,TX,WI)			WESTERN U.S. (AZ,CA,CO,ID,MT,NM,NV,OR,UT,WA,WY)		
Feature Rate 1/ Special Rate 4/ Activity Index 2/	62.8% of 7,900 sampled outlets 5.0% of stores w/ no-price promotions Activity Index = 21,350			55.3% of 5,200 sampled outlets 15.9% of stores w/ no-price promotions Activity Index = 6,910			66.6% of 3,900 sampled outlets 19.5% of stores w/ no-price promotions Activity Index = 8,450		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens	0.79 - 1.99	2,230	1.13	0.99	70	0.99			
" - Toms	0.79 - 1.99	2,230	1.13	0.99	70	0.99			
Frozen - Hens	0.29 - 1.69	5,710	0.82	0.38 - 1.19	2,240	0.78	0.38 - 0.99	2,500	0.60
" - Toms	0.29 - 1.69	5,810	0.82	0.33 - 1.19	2,350	0.79	0.33 - 0.99	2,500	0.56
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.99 - 2.89	740	2.16	2.29	50	2.29			
Frozen	1.37 - 2.69	1,020	1.83	0.99 - 1.99	480	1.71	1.49 - 1.98	170	1.71
Hotel Style									
Fresh									
Frozen	1.79	10	1.79						
Split, bone-in									
Fresh									
Rotisserie	4.49 - 8.99	370	7.29	6.99 - 7.99	250	7.01	6.99	10	6.99
Boneless, whole	3.99 - 4.49	30	4.24						
Cutlets	3.49 - 3.99	380	3.73	4.54	120	4.54	4.54	620	4.54
Cutlets, thin sliced	3.99 - 4.49	80	4.08						
Strips				4.54	120	4.54	4.54	610	4.54
Tenders	4.89	210	4.89	3.99	120	3.99	3.99	620	3.99
Marinated Tenders	3.99	60	3.99	3.73	10	3.73	3.73	10	3.73
Drumsticks	0.99	200	0.99						
Thighs									
Wings									
Necks									
Smoked Drumsticks				1.39	30	1.39			
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	2.29 - 2.59	230	2.52	1.66 - 2.50	190	2.36			
Sausage	2.08 - 2.79	190	2.26	2.00 - 2.50	180	2.48	2.38 - 2.63	680	2.46
85% lean	0.99	30	0.99						
93% lean	1.99 - 2.69	1,500	2.31	1.66 - 2.40	580	2.18	2.40	730	2.40
Breast (99-100% lean)	3.69 - 3.99	320	3.97	3.33	50	3.33			
Rolls (frsh/frz 1 lb.)	0.99 - 1.00	30	1.00	1.00 - 1.25	120	1.19	1.00	310	1.00